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## A JOURNEY TO THE QUALITATIVE WONDERLAND: LESSONS LEARNED FOR NOVICE RESEARCHERS

Kuan Chen Tsai<sup>1</sup>

### Abstract

*It is believed that through a journey of being a good researcher, it is beneficial to appreciate two different values drawing from two opposite paradigms, which in turn familiarizing oneself with two distinct conceptual frameworks thereby strengthening individual's research capacity. In this paper, a novice qualitative researcher shares four lessons learned from the process of conducting his first qualitative study. The lessons are: (1) Do your homework on the literature; (2) Carefully read regulations of Institutional Review Board; (3) Any confusion, ask the experts first; (4) If possible, try to use qualitative data analysis software; and (5) Reflect and challenge your assumptions all the time.*

### مستخلص

ويعتقد أنه خلال رحلة من كونه باحث جيد، من المفيد أن نقدر قيمتين مختلفتين رسم شكل نموذجين متقابلين، وهذا بدور تعريف نفسه مع اثنين من الأطر المفاهيمية متميزة وبالتالي تعزيز الفردية ليالي القدرات البحثية في هذه الورقة وأسهم الباحث المبتدئ النوعية أربعة الدروس المستفادة من عملية إجرائول دراسته النوعية. الدروس هي: (1) تقوم بأداء واجبك على الأدب (2) اقرأ بعناية وائح مجلس المراجعة المؤسسية؛ (3) أي التباس، اطلب من الخبراء الأولى؛ (4) إذا كان ذلك ممكنا، في محاولة لاستخدام برامج التحليل النوعي البيانات؛ و (5) تعكس وتحدي الافتراضات الخاصة بل في كل وقت

**Keywords:** *Journey, Qualitative, Lesson, Learned, Research.*

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## **A. Introduction**

I am a more quantitatively-oriented researcher. During coursework, I learned some statistics strategies: descriptive statistics, t-test, chi-square test, univariate and multivariate analyses of variance, regression, factor analysis, and the like. Those courses (research method, basic, and advanced statistics) map me to the early part of the journey to develop the awareness of what social scientists react when conducting a quantitative research. I recognized the power of numbers. At the same time, I also realized the “dark side” of numbers - manipulate numbers to fit your needs.

Until I took the basic qualitative course, I realized something was missing toward my journey to be a better researcher. In this course, I learned a variety of qualitative research methodologies such as basic interpretative method, narrative analysis, case study, phenomenology, ethnography, grounded theory, and the like (Merriam & Associates, 2002). After I was exposed to this paradigm, this “phenomenon” transformed my mindset and opened a new window for me.

The metaphor of qualitative method is more like the poetry. Through mountainous reading, I realized the beauty of text, the power of text. In contrast, while reading quantitatively-oriented papers, sometimes it makes me feel “dry” because there is no human feelings existing in numbers, especially no biased and objective are the criteria for scientific articles. However, when I read papers focusing on qualitative method, the landscape is so different. The image is vivid if well written. The article itself becomes a short story to lead audience to discover deep meanings of human experience. It is fascinating! In fact, “a key part of qualitative research is how we account for ourselves, how we reveal that world of secrets” (Anfara, Brown, & Mangione, 2002: 29).

## **B. Jump in With Both Feet**

Even though I know in my dissertation, I will utilize the quantitative approach to solve my research problems. However, in order to fully embark on this qualitative journey, I made a decision. I need to conduct a real qualitative study to not only consciously execute what I have learned but also purposely deliberate a meaningful learning process and, most important, product. Because

in my heart, I truly believe a good researcher should know both paradigms. The possible merit of a quantitative researcher conducting a qualitative research is that through the process of qualitative research, “we as researchers learn our strengths and weakness, our points of connection, and the boundaries of connecting with our participants” (Merriam & Associates, 2002: 421).

It is clear to me that quantitative and qualitative approaches have distinct and complementary strengths. Both demand a different set of skills and challenges. So if I want to completely shift my view and embrace another camp, what preparation I need to have? What equipment I need to include my toolbox? What experience I will face either pitfall or pleasure? What leaning outcome I will obtain? More centrally, “recognition that the creation of qualitative [studies] requires procedures and steps skills unique to the paradigm has resulted in at least one text focused on the process, including first hand comments and accounts from student about how to handle the experience and the process” (Melroy, 2002, as cited in Reisetter, Yexley, Bonds, Nikels, & McHenry, 2003: 465). Before I jump, there is an assumption I need to distinguish:

In the positivist paradigm, the object of study is independent of researchers; knowledge is discovered and verified through direct observations or measurements of phenomena. . . whereas the naturalist or constructivist view, is that knowledge is established through the meanings attached to the phenomena studied; researchers interact with the subjects of study to obtain data. (Krauss, 2005: 759)

In direct contrast to quantitative studies, as a qualitative researcher I do not need to identify the dependent variables and independent variables, which in turn propose the hypothesis. However, the main responsibility of qualitative researchers is to capture inside meanings of individual and explore the possibilities of the phenomena. Specifically, “qualitative research has the unique goal of facilitating the meaning-making process” (Krauss, 2005: 763).

Doing a qualitative study is not an easy task. Sangasubana (2009) identifies some pitfalls while conducting qualitative research: labor intensive and time consuming, balancing the participating and observing might be difficult, personal values and attitudes may lead to bias, and sometimes

ethical dilemmas need to be considering. Additionally, Baxter and Jack (2008) indicate a possible pitfall for the novice researcher is being overwhelmed by including numerous propositions that the researchers can handle, which in turn impacts the data analysis and reporting the findings.

Description is a double-edged sword in qualitative methods. Rich or thick description on the one hand is a strong weapon to arm qualitative research with legitimacy in the serious research field. Unfortunately, in the academia it also an Achilles" heel to be viewed as biased and is challenged with the ownership of the study. The key issue is how can the producer to persuade his views to consumers, if they do not trust him. A rose has its thorns. When I read the qualitative articles, I fathomed the beauty of the text, but at same time to some extent I was suspicious of the authentic meanings of the events.

### **C. A Blueprint for This Journey**

In my independent study, the research project I have done was to explore creative process in adult learners. As Rowlands (2005: 83) points out, "for researchers, the starting point is to identify one"s philosophical and theoretical assumptions leading to a choice of an appropriate methodology". I used a phenomenological framework to explore, describe, and discover the subjective experience of creative action and to seek the essence of this phenomenon. Ausband (2006: 766) suggests that, "the quality and number of participants can determine the final quality and richness of the project"s results, and the contribution it can make to the field of study". So I recruited 10 participants to this study. Then in order to explore participants" perceptions of their creativity experience, they were asked to create a collage with a creative goal, for which they were given 20 minutes. The main reason of this activity was to create a fun experience, use their imagination to play with the material, and transfer their abstract ideas into concrete art products.

Concerning the methods, Ausband (2006: 766) recognizes that "using the appropriate methods for data collection will result in richer and more complete data that will provide more complete answers fort the research questions". Accordingly, I used a follow-up questionnaire with five open-

ended questions that was sent to the participants by email. I did not use the traditional face-to-face interview strategy to collect the description was because based on Efinger, Maldonado, and McArdle's (2004) and Petocz, Reid, and Taylor's (2009) study, the validity of using this kind of data collection was confirmed. After one week, they wrote their responses in the questionnaire and sent back to me by email. Initially, this idea was to give participants more time to reflect on and write about their experience.

When I analyze quantitative data, SPSS is my major tool. So when I attempted to execute coding process for this qualitative study, I searched some computer-assisted data qualitative data analysis software (CAQDAS) programs to undertake data analyses. As Leech and Onwuegbuzie (2007) indicate, CAQDAS programs are blessings for qualitative researchers to manage data and exercise more complex data analyses. However, a caveat is called "CAQDAS programs can help researchers to analyze their data, but they cannot analyze the data for researchers" (Leech & Onwuegbuzie, 2007: 578).

For this project, I used Nvivo 9 software (2010) for the practice of coding and the data analysis. In order to take advantage of this program, I spent one month to learn this software. The software textual analysis of the questionnaire helped to identify and organize relevant ideas and quotations to support to generate the suitable categories. The coding process followed the suggestion provided by Creswell (2007), including five phases: (1) initially read through the text data in order to obtain a whole picture of the description; (2) divide the text into segments (sentences or paragraphs); (3) label the segments of data with 30-40 codes; (4) carefully examine codes for overlap and redundancy and then reduce codes to 20; (5) finally, collapse codes into 5-7 themes from a major idea in the database.

#### **D. Advice for Novice Researchers**

After finishing this project, I more appreciate different participants' unique insights from this study. I also recognize the limits of creativity research from the perspective of the quantitative approach. Taken as a

whole, I would use Mezirow's (1991) "transformative learning" to express this transformative experience. According to Mezirow (1991: 117), transformative learning "pertains to both the transformation of meaning schemes through content and process reflection and the transformation of meaning perspectives through premise reflection" (p. 117). More specifically, "what needs to be learned for transformative learning is critical reflection on assimilated epistemic assumptions and critical dialectical judgment to validate new assumptions". Through the reflection of this research process, it challenges assumptions I had about the essence of the research; at the same time I reflect what meanings I make from this journey to be a good researcher in the near future.

In this transformative learning process, there are many priceless lessons I learned. This reflection might serve as a good resource for doctoral students who are willing to involve in the qualitative study and for faculty who are teaching qualitative research courses.

### **1. Lesson 1: Do your homework on the literature**

Before I started this project, I read about 30 articles from creativity literature and 20 articles and books from qualitative research literature. It is quite true that the more you read the better position you will be. The fruits produced by previous researchers nourish my mind; they provide a bedrock, background, and context for the extant new research.

Ausband (2006) contends that initial planning is important when conducting qualitative research, including considering the appropriate methodology and methods for your research questions. Because I was a novice qualitative researcher, I spent some time devouring journal articles and textbook material. I found it was very useful to read journal articles. They provide a model, a structure to conduct the qualitative study. Specifically, after decided my phenomenological methodology, I searched related literature and focused on how they delivered their research process. Taken together, the literature could provide an excellent resource for novice researchers to plan their studies. If I were to distribute my advice to those who come after me, I would say: even during the phase of coding your data, keep reading.

## **2. Lesson 2: Carefully read regulations of Institutional Review Board**

During this journey, my first pitfall was the Institutional Review Board (IRB). The purpose of IRB is to maintain ethical standards and protect human subjects. To some extent it is like quality control to your research process. I had experienced to conduct a survey study before and I assumed the application of IRB is the same. So when I submitted my proposal to the IRB, I was rejected and asked to rewrite some section of my study. It took me three times to rewrite my proposal back and forth. Finally I received the approval, but it took me over one month.

The biggest issue I had was informed consent form. When I conducted a survey research, I received the approval of IRB within one week. But this time was not smooth. I was wondering “what’s wrong with me!” After I discussed this pitfall with other people (including my adviser), I realized that for the qualitative research, the committee of IRB are more concerned the procedure. After all, participants will expose their inner feelings and emotions to you; therefore, ethical considerations should be more rigorous. Bowen (2005: 214) wrote, “Risks and concerns are greater in qualitative research than in quantitative research. This is mainly because of the close involvement of the researcher with the research process and with the participants.” This statement is quite true that I felt more intimacy with my 10 participants (all of them are my classmates) after I finished the qualitative study. In contrast, I did not really know my subjects (over 30 people) from my survey study.

## **3. Lesson 3: Any confusion, ask the experts first**

During this journey, I expected to see numerous fuzzy and cranky backdrops passed by, which distract my attention and confuse my thoughts to complete this great venture. I was very fortunate to have a good adviser with a strong background of qualitative research. When I drafted this proposal, she gave me valuable suggestions to tackle the issues I faced, from recruiting potential participants, to selecting an appropriate approach, and to building validity of the study.

A good mentor plays a significant role toward the journey of being a good researcher. Consulting the experts could save novice researchers a lot of time to explore this new area.



Qualitative research design principles “lend themselves to including numerous strategies that promote data credibility or „truth value”” (Baxter & Jack, 2008: 556) and that is why “trustworthiness, critical for obtaining valid information from participants, is an important element of qualitative research” (Knoche & Zamboanga, 2006: 141). For instance, when I designed my study, I used triangulation and auditing for the maintenance of trustworthiness. However, my adviser suggested me to use member check instead of auditing. An audit trial is the method that uses an outside expert to evaluate the research process from the transcriptions to ending with the themes. Because of a time limit of this independent study (one semester), it was not doable to my study. As a consequence, I used member check and sent my polished report (not raw data) back to three of my participants to check the accuracy of my description and interpretation of their responses.

I believe that questioning the legitimacy of research will push researchers to more critically conduct the study in order to earn the trust of the audience. It also points out that the training of being good qualitative researchers is likely more challenging and time-consuming. Moreover, in order to prevent jeopardizing my credibility of the research, as a qualitative producer I need to prepare myself to confront various ethical issues to be faced while experiencing the research process.

During the meeting with my adviser, I asked her about “how could a person like me to become a good qualitative researcher?” She knew my background (more preferring a quantitative approach) and suggested me that seeking any opportunities to conduct this kind of research in the future is an important learning strategy. Simply put, Practice! Practice! Practice!

#### **4. Lessons 4: If possible, try to use qualitative data analysis software**

For this study, I learned a new program to assist me to boost the coding process. I experienced the power and the efficiency of this kind of program for data management. Although it took me a while to master this program, it paid back. After I was successfully completing this study through using the program, I was very pleased my accomplishment and highly recommend my colleagues to take advantage of qualitative data analysis software for their qualitative study.

However, I was also aware of that the researcher is still the main instrument for analyzing and interpreting qualitative data. Krauss (2005: 760) argues that “qualitative research is based on a relativistic, constructivist ontology that posits that there is no objective reality”. Consequently, my unique perceptions and interpretations of the data were essentially in the process of constructing the meanings of information. Even though I utilized the program for coding, I was still the person to execute the interpretation of my coding and to lead my final goal.

### **5. Lesson 5: Reflect and challenge your assumptions all the time**

Based on the studies (Efinger, Maldonado, & McArdle, 2004; Petocz, Reid, & Taylor, 2009), I assumed my data collection (electronic format) was adequate to gather enough and thick description from the participants. Unfortunately that was not my case. According to their returned questionnaires, there were short answers (three to five sentences for each question), lacking detailed and lengthy elaborating their thoughts. It made me wonder the utility of this method in the qualitative study. But if I take the context into consideration, it might explain why I failed. In their studies, the researchers were also the instructors of the class, so participants would have the assumption that it was “special” assignments of the class. The chances were they would take more time to elaborate their responses. On the other hand, in my study, the relationship between me and participants was classmates. I could not expect them (all were doctoral students) to devote their busy schedule to answer the questions and to share their experiences. Thus, if I have another chance to do another similar study, I would consider including the face-to-face interview.

One of the primary lessons I learned was that the value of individual voice. Even though I did not receive enough substantial responses from participants, they did provide diverse and unique voices with regard to the exercise, from past experiences to future suggestions. Upon the reflection, it reminded me if I were an adult educator who is willing to promote creativity in my classroom; I would consider the affective perspective of their creative process. More specifically, adults have their own experience and adult educators should bridge their experience to meaningful leanings.

What happen if I used the quantitative method to conduct the similar study, it might be difficult to detect the nuance and discover the sacred inner world of individuals. Being a researcher, I also learned to appreciate their contributions of my study. I recognized my strength and limit of the study; meanwhile their experience became a good resource for my growth to be a good researcher.

### **E. Final Remark**

The merit of learning qualitative research is to prize the individual unique voice and experience. Being a good researcher, I would argue that we should appreciate two different values drawing form two opposite paradigms, which in turn familiarizing yourself with two distinct conceptual frameworks thereby deepening your intellectual capacity. The bottom line is: two opposite camps have their unique position and value. You cannot disregard the imperative system belief behind each of them. To some extent both approaches have some contributions to progress on the horizon of knowledge. Again, as Bowen observes, “quantitative and qualitative research have distinct and complementary strengths. The main strength of qualitative research is that it yields data that provide depth and detail to create understanding of phenomena and lived experience” (Bowen, 2005: 209).

During this journey toward doing qualitative research, critical thinking, according to Bowen’s (2005) suggestion, would always come into play since the process includes interpreting, inferring, analyzing, and evaluating. Most important, “critical thinking required open-mindedness in examining diverse ideas, persistence in seeking answers to crucial questions, and prudence in making judgments and reaching conclusions” (Bowen, 2005: 211). Substantial reading is another key for me to obtaining new and useful insights. It is possible that eureka moment will happen via the connection between salient ideas and key concepts while I am reviewing the literature.

Upon reflecting this experience, I do believe that conducting a good quality of qualitative research, it is “beyond the acquisition of research knowledge and the development of a specific set of skills, a variety of attributes and abilities are important, such as creativity, flexibility, and

inquisitiveness, among others” (Hunt, 2010: 70). Specifically, “qualitative research requires the development and practice of specific habits... Habitual practices require a minimum of reflection or deliberation” (p. 70). Most important, for the novice qualitative researchers like me, he provides useful tips that “apprenticeship and engaged mentoring play critical roles in supporting novice researchers” (p. 74). It reminded me that as doctoral students we should capitalize the opportunity of being a research assistant or building a research-based relationship with faculties. We can discuss our research projects with faculties and seek to feedback, and if possible try to collaborate with them and publish your results. It might be a good training.

Through this qualitative practice for conducting my project, there might be some useful lessons and positive results I can draw. First, be patient and respect your participants because they so trust your research ability to capture their inner feelings. I will appreciate their involvement and efforts. By this intense connection with them, we might be good friends and network later. Also, I could obtain more holistic picture about the issues, which is important training to being researchers. The findings might be helpful for other researchers or stakeholders of this interest to build more creativity-friendly classroom for promoting creativity. Finally, as an educator, I could reflect my teaching and action while facing those students with creative potentials.

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